Kuali Account Delegate

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The Kuali Account Delegate function will establish new or copy/edit an existing Account Delegate, these are users that are authorized under certain circumstances to take workflow actions on a e-document in place of an account’s Fiscal Officer.

There are two types of delegates; primary and secondary. Primary has the e-documents routing directly to their action list and literally take over for the fiscal officer. Primary delegation should generally not be used; it is intended for those occasions when the fiscal officer has planned to be out of the office. Secondary delegates do not automatically see the documents on their action list and must apply a special filter to their action list to see the e-document.

Account Delegate is found on the Main Menu of Kuali:

The most simple way to delegate is by using the Account Delegate function:
In the upper right hand corner you can create a new delegate.

This document creates a completely new delegation for **ONE** type of e-document for **ONE** user, for example you could allow a person in your department to approve requisitions for the fiscal officer.

Account Delegate Create New e-document:
Simplest to do, enter the Chart Code, Account, Document Type, who you want to delegate to, lower and upper dollar amounts, check Primary if desired, Active (can inactivate/reactivate in the future) and the date to start the delegation (date has to be today or in the future, you cannot delegate into the past).

Note: You may use Document Type Name **KFST** to delegate ALL documents that require a fiscal officer approver with only one line entry.
This is a little more complicated, notice the Add buttons on each where you can add either multiple people/e-doc types and/or multiple accounts. Please realize that since the person is tied to the document type you may, on the same document, set up one person for one type of e-doc, another for another type and hook them both to one or more account numbers.

One caveat, Global documents replace **ALL** existing delegation for an account instead of updating. If you want to use Global documents you should save a model that you modify so that it keeps previous delegations.

Note: You may use Document Type Name **KFST** to delegate **ALL** documents that require a fiscal officer approver with only one line entry.
An account model will store the person/e-doc types/amount limits so that they may be re-used. If you have a complex set of delegations to make or anticipate that your delegations will change it is recommended that you use a model. The model is similar to the account global document in the way that it collects the people and the documents that are being delegated to them, the account information gets added in when you create a new global from model document.

Again it bears repeating - One caveat, Global documents replace **ALL** existing delegation for an account instead of updating. If you want to use Global documents you should save a model that you modify so that it keeps previous delegations.

Note: You may use Document Type Name **KFST** to delegate **ALL** documents that require a fiscal officer approver with only one line entry.
Create New Global from Model

This shows the result of a model that was created for mldennis to approve requisitions up to $1500 and for cglaze to approve up to $250, no information was entered into this e-document at this point – everything came from the saved model. Information from the model as well as all other information can be modified as needed.

Some notes of interest

- Global documents replace **ALL** existing delegation for an account instead of updating. If you want to use Global documents you should save a model that you modify so that it keeps previous delegations.
• There can only be one primary delegate for each account/e-document type
• Don’t use primary delegates unless you want to temporarily completely replace the fiscal officer.
• Start date must be greater than or equal to today